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ABSTRACT

This guide sets forth minimum approval criteria for secretarial training in office occupations education programs in Oregon. The information in the guide is intended for use by district-level curriculum planners, teachers, regional coordinators, or state education department staff involved with new program development or revisions of existing programs. The guide outlines the instructional content of secretarial education programs in terms of program descriptions, areas for training, program goals, course/content goals, and sample performance objectives. Descriptions are given of the following course titles: Office Procedures, Typing, Office Machines, Business Communications, Bookkeeping/Accounting, Shorthand, and Cooperative Work Experience. A section on organizational options is designed to illustrate a few of the many ways to deliver the minimum instructional content required for an approved vocational cluster program. Content is illustrated by course titles for the instructional levels to recognize that students from different grades may enroll in one or more levels of a program. (KC)

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CLUSTER BRIEF

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OFFICE OCCUPATIONS

SECRETARIAL CLUSTER

November 1984

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OFFICE OCCUPATIONS
SECRETARIAL VOCATIONAL CLUSTER PROGRAM
MINIMUM APPROVAL CRITERIA

The following information is for use by district-level curriculum planners, teachers, regional coordinators or Department staff involved with new program development or revisions of existing programs. For more information about instructional content, see Office Occupations Curriculum Guide - 1983.

The minimum approval criteria for a Secretarial Cluster program are set forth in this document. The instructional content is outlined in terms of program descriptions, areas for training, program goals, course/content goals and sample performance objectives. Course titles and descriptions are also included.

The section on organizational options is designed to illustrate a few of the many ways to deliver the minimum instructional content required for an approved vocational cluster program. Please note that time is illustrated in terms of credits. Content is illustrated by course titles for the instructional level(s) to recognize that students from different grades may enroll in one or more levels of a program.

Program Description

The Secretarial Cluster program contains planned learning activities including a combination of courses and practical work experiences concerned with creating, classifying, and filing records; taking manual or machine shorthand dictation or transcribing from dictation/transcription equipment; and carrying out general duties. Places of employment for secretaries or administrative assistants would be general offices, banks, legal offices, medical offices, technical offices, dental offices, sales offices, or word processing systems as administrative support personnel.

Areas for Training

Secretary (traditional)
Word processing secretary

Program Goals

Students will be able to:

- Plan, enter and advance in an office occupations career.
- Apply habits and work attitudes needed for success in obtaining employment, retaining jobs and advancing in their occupations.
- Use appropriate skills in business communications.
- Solve business problems using computational skills.
- Perform information processing tasks.
- Follow general office procedures.
- Arrange appointments, meetings, conferences and travel for business staff.
- Establish and maintain an appropriate work environment.
- Identify a variety of career options and career ladders including entrepreneurship in secretarial work.

Course/Content Goals

CAREER DEVELOPMENT

Students will be able to:

(Career Planning)

Assess their interest, aptitudes and abilities in relation to career goals, career requirements and lifestyle preferences.

Describe the career ladders for analyzing jobs and careers.

Apply decision-making skills in making career choices.

Identify entrepreneurial opportunities in making career choices.

(Job Seeking)

Identify primary sources of information on job availability.

Complete a personal resume/data sheet on qualifications for employment.

Write a letter of application for employment.

Dress and groom appropriately for job interviews.

Complete employment application forms.

Complete testing procedures required by prospective employers.

Use appropriate interviewing skills.

Describe legal aspects of hiring, including both employer and employee rights.

(Job Retention and Growth)

Conduct a self-evaluation of personal traits, work attitudes and career goals.

Evaluate jobs.

Assess compatibility of personal and career goals.

Conduct self-appraisals of job performance.

Explain the need to keep current on technological advancements through continued education and training.

HUMAN RELATIONS

Students will be able to:

(Personal Traits)

Apply acceptable grooming and hygiene habits.

Apply efficient and productive work habits including:

- Time management
- Work flow management
- Punctuality
- Regular attendance
- Thoroughness
- Teamwork
- Neatness
- Initiative
- Self-evaluation

(Work Attitudes)

Apply a positive attitude toward work.

Deal with job stress and conflict.

Promote a positive business image with clients.

Show respect for authority.

Show respect for property.

Demonstrate respect for co-workers.

Accept and give constructive suggestions and praise as related to job performance.

Accept results of performance appraisals as positive steps for improvement in job role.

Apply ethical behavior in the performance of work assignments.

- Honesty
- Loyalty
- Confidentiality

Originate work.

Apply ability to cope with change.

COMMUNICATION SKILLS

Students will be able to:

(Language Skills)

Punctuate and capitalize correctly.

Apply spelling rules.

Use grammar that is correct and appropriate to business communications.

Divide words correctly.

Use appropriate business vocabulary.

Use numbers correctly.

Write legibly.

Use the following reference sources:

- Thesaurus
- Secretarial handbooks
- Zip code directory and other postal information
- Almanac
- Atlas
- Professional/trade publications
- Company handbooks or procedures manuals
- Telephone directory
- Oregon Blue Book and related government/public resources
- Catalogs
- Library
- Equipment manuals

(Basic Verbal/Nonverbal Skills)

Read with speed and comprehension.

Write business letters, memorandums and reports.

Speak effectively in meetings and discussions.

Listen effectively.

Use nonverbal communications effectively:

Body language

Voice inflection

(Proofreading and Editing)

Use proofreading marks to indicate needed corrections.

Identify errors in typing, grammar, spelling and word usage.

Edit and revise text on hard copy or CRT.

COMPUTATIONAL PROCESSES

Students will be able to:

(Computational Skills)

Add, subtract, multiply and divide whole numbers.

Compute with fractions, decimals and percentages.

Estimate answers.

Solve practical problems through applications of basic computational skills.

Solve business problems on a 10-key keyboard.

(Financial Records)

Perform the following bookkeeping functions:

Record transactions
Prepare information for financial records
Retrieve information from financial records
Prepare and maintain payroll records
Operate a petty cash fund
Make change
Process accounts payable
Process accounts receivable
Record and maintain inventory records

Perform the banking functions of a business office:

- Deposit funds
- Maintain check register
- Reconcile accounts

INFORMATION PROCESSING

Students will be able to:

(Dictation/Transcription)

Take dictation using shorthand, an acceptable alternative or dictation equipment.

Give dictation verbally or with dictation equipment using correct procedures.

Transcribe dictation using transcription equipment or written notes into final document form.

(Keyboarding)

Use correct keyboarding techniques in the operation of:

- Typewriters
- Microcomputers
- Word processors
- Data-entry terminals

Operate a 10-key keyboard by touch with acceptable levels of speed and accuracy.

Select appropriate format for business documents.

Compose business documents at the keyboard.

Produce business documents such as:

- Business letters and envelopes
- Inter/intra-office communications
- Minutes and reports of meetings
- Cards and labels
- Financial, tabulated and miscellaneous reports
- Manuscripts
- Outlines
- Meeting agendas
- Pre-printed business forms, such as checks, purchase requisitions, purchase orders, invoices and vouchers
- Legal, medical and technical documents

Make corrections on copy by:

- Erasing
- Applying correction fluid and self-adhesive or paper tapes
- Correction tape on typewriter
- Correction paper
- Squeezing and spreading
- Backspacing and strikeovers on correcting typewriters and word Processing equipment
- Cutting and pasting

Perform routine maintenance of equipment/hardware.

(Reprographics)

Use effective formatting techniques in all methods of reprographics.

Prepare masters, select appropriate materials, and operate equipment to duplicate materials:

- Spirit duplicator
- Mimeograph
- Heat sensitive duplication (Thermofax)
- Photocopier
- Offset

Prepare paste-ups for photocopying.

Collate and staple duplicated materials.

Locate outside printing services available to their office.

Operate microfiche and microfilm reader and printer.

Determine most efficient and cost effective method of reprographics for a particular job.

(Information Processing Concepts)

Explain that information processing is the interaction of people, equipment and procedures in processing information from ideas into written documents.

Use the vocabulary that relates to information processing such as:

- Cathode ray tube
- Punched card
- Magnetic tape/card
- Electronic typewriter
- Display vs. nondisplay
- Floppy disk
- Standalone text editor vs. shared logic system
- Dedicated vs. nondedicated (software-based) system
- Networking
- Peripheral devices
- Phototypesetting

Explain the steps in the information processing cycle:

- Input
- Processing
- Output
- Reproduction
- Distribution
- Storage/retrieval

Explain the applications of information processing:

- Repetitive communications (form letters)
- Transcription typing
- Text preparation and editing

- Combined repetitive and variable typing (financial statements and tabulations)
- Composition

List and explain careers available in information processing.

GENERAL OFFICE PROCEDURES

Students will be able to:

(Mailing and Shipping)

Process incoming mail:

- Open and sort
- Maintain register
- Distribute
- Read, highlight and annotate

Process outgoing mail:

- Fold and insert letters and enclosures in mailing envelopes
- Address letters and packages
- Wrap and seal packages
- Manually stamp and seal envelopes
- Forward mail
- Insure, register and certify mail
- Prepare mailing lists
- Trace mail
- Operate postage meters and scales
- Calculate postal rates
- Purchase postage for meters
- Process bulk mail
- Use U.S. Postal Service manuals
- Arrange for freight express, UPS, private mail and fast/overnight mail service

(Telecommunications)

Use appropriate procedures and voice skills in answering a telephone.

Place local, long distance and conference telephone calls.

Transfer or refer telephone calls to other areas and departments.

Screen telephone calls for employers and supervisors.

Send and receive telegrams, mailgrams and cablegrams.

Place calls with consideration to the time zones of the receivers.

Maintain record of long-distance telephone calls.

Explain trends and changing technologies in telecommunications such as:

- Electronic mail
- Facsimile
- Modems
- Teleconferences

(Receptionist Techniques and Tasks)

Receive and host office visitors.

Provide information to visitors.

Screen visitors for personal meetings with business staff.

Introduce visitors to office staff.

Assist visitors to appropriate locations in office area.

Make pre- and post-meeting and conference arrangements.

Maintain visitor log.

Order and maintain supplies for the office.

Receive and deliver business messages for the staff.

Maintain a positive relationship with visitors.

Arrange guided tours for visitors.

Maintain a clean and orderly reception area.

Handle crisis situations that arise in the office:

Emergencies	Security
Irate customers	

Explain the logistics of the office:

Staff assignments and responsibilities	Resources available to the office

(Records Management)

Explain common methods of records storage:

Electronic	Microfilm
Microfiche	

Establish, supervise and/or maintain files.

Establish and/or maintain filing systems:

Alpha/numeric	Subject
Geographic	

Process, sort and file business records according to the records management system:

Standard documents	Magnetic media
Computer printout records	Microfiche and microfilm
Computer tape records	

Handle classified and confidential files.

Retrieve needed information from files.

Administer charge-out procedures for files.

Establish and/or maintain cross-reference listings.

Maintain security on confidential files.

Merge and/or revise files.

Apply procedures for purging of files:

- Transferral of records from active to inactive files
- Disposal of unneeded records

Supervise the maintenance of decentralized files.

MAKING BUSINESS ARRANGEMENTS

Students will be able to:

Schedule and confirm business appointments and meetings.

Maintain appointment calendars.

Prepare daily appointment schedules.

Cancel and/or reschedule appointments.

Schedule and confirm facilities for meetings and conferences.

Help prepare entertainment plans for receptions, luncheons and dinner.

Prepare and confirm arrangements for meetings and conferences.

Use travel information resources:

- Travel agencies
- Transportation schedules
- Official Airline Guide
- Hotel/motel guides

Make travel reservations.

Compile schedules and itineraries.

Prepare and secure travel advances and traveler's checks.

Make teleconference arrangements.

WORK ENVIRONMENT

Students will be able to:

Understand the requirements of a productive office environment.

Set up appropriate personal work stations.

Arrange work schedules to enhance the work environment including time for lunch, breaks and work-related errands.

Work safely in an office environment.

Sample Performance Objectives

Students will be able to:

Transcribe dictation using transcription equipment or written notes into final document form.

Given one average-length letter and one average-length memorandum, the student will transcribe each in mailable form within 45 minutes.

Prepare daily appointment schedules.

Given a number of disorganized notes and memos, the student will prepare a one-day schedule of appointments with 100 percent accuracy.

Use travel information resources.

Given a copy of the Official Airline Guide, the student will plan a round-trip by air between the nearest commercial airport and a destination of his/her choice involving at least two plane changes with 100 percent accuracy.

Course Titles and Descriptions

OFFICE PROCEDURES (Year): Office procedures is often referred to as the "capstone course" of an office occupations program because it ties together the knowledge and skills acquired in other business courses. It also introduces the student to new, related subject matter, adding to his or her competence as a future office employee.

Office procedures should establish a link between school and business, and should, therefore, include all information, procedures and equipment typically used in an office. This includes training in word and data processing, mailable letters, letter writing, calculating machines, mail and shipping services, filing and records management, reprographics, financial records,

telephone techniques and transcription. The course also includes job application and career information, emphasizing the development of productive attitudes and work habits.

Instruction may be provided through traditional classroom techniques, individualized instruction (open lab), model office, office simulation or a combination of these approaches. The course should be used as the related classroom instruction for office occupations students participating in cooperative work experiences. For those students, classwork is correlated with actual experience in a business office. Usually students spend half the school day in classes and the other half in an office. Classwork concentrates on office occupations skills and procedures, although additional work may be assigned to students in specific areas where job performance shows a need for it.

TYPING II (Year): In advanced typewriting, students develop employment skills. Production work is the major emphasis of the course, and includes typing manuscripts, stencil and spirit masters, programs, minutes of meetings, statistical tables and business forms. Students learn to dictate at the typewriter and correct errors. They perfect their typing skills through assignments that are typical of actual office work.

OFFICE MACHINES (Year): Schools can teach machine skills several ways. One is to offer a separate office machines course. Another approach is to teach these skills in other courses such as office procedures, business math and advanced typing. A third alternative is to offer office machine instruction in a skills laboratory with individualized teaching.

As a separate course, Office Machines teaches students to solve business problems by using various business machines such as the electronic calculator, reprographic equipment, dictation/transcription equipment and word/data processing equipment.

BUSINESS COMMUNICATIONS (Semester): Business Communications emphasizes grammar and writing for business letters. Students should also study the various types of oral communications, including listening, speaking, dictation and telephone techniques, as well as the process and theory of communications, nonverbal communication, reading for comprehension, proofreading and editing.

BOOKKEEPING/ACCOUNTING I (Year): Bookkeeping/Accounting I gives students experience maintaining financial records, along with interpreting and analyzing them. Practice sets with business papers may be used to emphasize record management. Instruction in the application of electronic data processing may also be integrated throughout the course. The fundamentals and terminology of accounting are emphasized.

This course usually includes the basic methods of computing, classifying, recording and maintaining numerical data involved in financial and product control records, including the paying and receiving of money. Career objectives related to bookkeeping and accounting are identified and discussed.

SHORTHAND I (Year): Shorthand I covers the theory of shorthand, emphasizing reading and writing skills, dictation and transcription. During the second

semester, students increase their note-taking speed and learn to transcribe mailable letters on the typewriter. The course integrates shorthand, typing and language skills.

SHORTHAND II (Year): Shorthand II is designed for secretarial students who want further shorthand skills. Speed building and typewritten transcription of mailable letters usually are the two most important units following a review of shorthand theory. Emphasis is placed on the production of letters according to office standards. Students may also practice taking dictation using letters of increasing difficulty and length.

COOPERATIVE WORK EXPERIENCE: The term "cooperative" refers to the working relationship between office occupations, participating businesses and local schools. Office occupations instructors and employers work together to develop on-the-job learning experiences which will reinforce classroom instruction. Students are awarded credit for these experiences. Employers help coordinate on-the-job activities and supervise trainees. Students, teachers and employers plan and evaluate the program on a regular basis.

The office occupations instructor and employer outline individual student's responsibilities and training experiences on the job in a written document called a training agreement. Job experiences are coordinated with classroom instruction and opportunities are identified for the student to apply curriculum on the job. The agreement is usually signed by the employer, student, teacher, and parents or guardian; it requires school approval. A written learning program known as a training plan details the task to be learned by individual students, and may suggest learning activities for each task. Plans serve as a structure for learning experiences and can also help in evaluating student progress. Plans can be maintained by students to help them develop a sense of responsibility for their own progress.

* *

Minimum Secretarial Vocational Cluster Approval Criteria

In addition to specific cluster criteria, state-approved vocational programs shall meet the criteria for approval of all secondary vocational education instruction as listed in the Handbook of Policies and Procedures for Vocational Education Instruction in Oregon Secondary Schools, 1985.

Criteria outline:

- 4 credits (130 hours per credit) offered within a maximum of four years:
  - 1 credit office procedures
  - 1 credit vocational shorthand
  - 1 credit second-year typing
  - 1 credit to include any of the following or the equivalent:
    - 1/2 credit business communications
    - 1/2 credit office machines
    - 1 credit accounting
    - 2 credits secretarial-related cooperative work experience
- Instructional time blocks of sufficient duration for skill development to meet industry standards.
- Program goals, course goals and instructional content which reflect those in the state cluster brief.
- Provision for occupational cooperative work experience.
- Vocationally certified teacher.
- An active, representative occupational advisory committee.
- Future Business Leaders of America (FBLA) as an integral part of the instructional program.

* *

Organizational Options

There are many acceptable options for delivery of instructional content while assuring that a quality program is provided. Schools have the opportunity to schedule classroom and laboratory activities to accommodate students and to facilitate learning. Delivery options include after school, weekends, summer school or alternate days.

Options:

A: FOUR-YEAR PROGRAM	Year 1	Office Machines 1/2 Credit	Accounting I 1 Credit
	Year 2	Shorthand I 1 Credit	Typing II 1 Credit
	Year 3	Shorthand II 1 Credit	Bus. Communications 1/2 Credit
	Year 4	Office Procedures 1 Credit	CWE 1 Credit
B: THREE-YEAR PROGRAM	Year 1	Typing II 1 Credit	Shorthand I 1 Credit
	Year 2	Accounting I 1 Credit	Shorthand II 1 Credit
	Year 3	Office Procedures 1 Credit	CWE 1 Credit
C: TWO-YEAR PROGRAM	Year 1	Typing II 1 Credit	Shorthand I 1 Credit
	Year 2	Office Procedures 1 Credit	CWE 1 Credit

If you need technical assistance, call the Occupational Program Specialist at the Department of Education. The specialist's name and phone number appear on the first page of this document.

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